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STEPS INVOLVED IN DESIGNATING AGENCY EMPLOYEES AS
PARTICIPANTS IN THE CIA RETIREMENT & DISABILITY SYSTEM

1. Preparation of computer listings by the Office of Computer Services showing names of Agency employees by age groups and the amounts of their Federal service, Agency service and overseas service. It is planned that the records of those Agency employees with three or more years of Agency service, and age 25 or over, will be reviewed to determine their eligibility for designation as participants in the System. This review will be phased so that those employees who are now eligible for retirement, or nearly so, will be considered first. Successively lower age groups will then be reviewed. It is anticipated that all employees will have been considered by the end of Fiscal Year 1966.

2. Career Services review employee listings to determine those employees who meet the criteria for designation as participants in the System and those who clearly do not.

    a. Career Services "redline" the names of employees who do not meet the criteria for designation.

    b. Career Services prepare and forward Form 3100, Nomination and Designation of Participant, in behalf of employees who meet the criteria for designation.

3. The CIA Retirement Staff reviews all Forms 3100, Nomination and Designation of Participant, submitted by Career Services. This includes a check of the claimed periods of qualifying service and the status of Form 3101, Service Agreement. In addition, the CIA Retirement Staff:

    a. Prepares notifications to those employees who have been "redlined" to advise them of their non-eligibility for designation as participants and of their right to appeal to the Director.

    b. Prepares cases of employees who meet the criteria for designation and submits such cases to individual Board members for review prior to discussion at formal meetings of the CIA Retirement Board.

4. The CIA Retirement Board recommends approval or disapproval of requests submitted for designation of employees as participants in the System.

5. The CIA Retirement Staff:

    a. Takes necessary action to effect the issuance of a Form 1150, Notification of Personnel Action, officially designating employees as participants in the System, which also serves as the official notification of such designation to employees paid from non-confidential funds.

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5. The CIA Retirement Staff: (con't.)

b. Prepares individual notifications of approval of designation as participants in the System for employees paid from confidential funds.

c. Prepares an interim notification to those employees recommended for designation by the CIA Retirement Board who:

(1) have 15 or more years of Agency service, and

(2) have 5 or more years of qualifying service.

The purpose of this notification is to advise an employee that he qualifies for designation and to inquire in advance of formal designation as to whether he would elect to remain in the System or to leave it after formal designation as a participant.

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